Last Updated: 09/16/2020

MO ACTS Release Notes

NEW SYSTEM FUNCTIONALITY

Missouri DHSS Department of Health and Senior Services

MO ACTS
Missouri's Advanced Contact Tracing System

Release Notes

Missouri's Contact Tracing Platform

This document includes important information about new MO ACTS functionality and system enhancements from each build release. Use this guide to understand the step by step processes about adjustments, improvements and changes within the MO ACTS platform.

Section (click for details)	**Description**	**As of Date / System Release**
MO ACTS Automated Case Monitoring: SMS Messages Functionality	In this section you will learn how cases can be monitored by using MO ACTS to automatically send SMS messages to contacts in order to efficiently track their symptoms if/as they arise.	9/17/20 Version 3.1
MO ACTS Multiple Exposures for One Contact	Learn about how MO ACTS will now show if a Contact to a COVID-19 case has had multiple exposures.	9/11/20 Version 3.0
MO ACTS System UI Enhancements	Learn about various User Interface (UI) enhancements, including: additions to List Views, a new editable County field, enhancements to picklists, and a new Provider Name field.	9/11/20 Version 3.0
MO ACTS Surge Resource Enhancements	Learn about case visibility when case ownership is transferred to a surge resource in your jurisdiction.	9/11/20 Version 3.0
MO ACTS Auto Task Logging for Calls Functionality	In this section, you will learn how the process for logging calls has been updated to occur automatically during the Contact Outreach Process.	9/11/20 Version 3.0
MO ACTS Inbound Calling Functionality	In this section, you will learn how the process for logging calls has been updated to occur automatically during the Contact Outreach Process.	9/11/20 Version 3.0
MO ACTS Reporting Functionality	Learn about the various reports that Business Admins and Supervisors are able to utilize to track usage of the MO ACTS System, the time it took for a contact tracing case to move to monitoring and support, and the ability to export reports and import data through the View/Configure Setup Menu Export Reports permission.	9/11/20 Version 3.0

MO ACTS Email Functionality	Follow these steps the first time you send an Email through MO ACTS to set up a template.	8/20/2020 Version 1.1
MO ACTS Change County or Jurisdiction Functionality	In this section you will learn how to update a Contact to a COVID-19 Case's county in the Personal Details screen of the Guided Script as well as how to change the Case's jurisdiction – Including important considerations related to this change.	8/20/2020 Version 1.1

MO ACTS Automatic Case Monitoring: SMS Messages Functionality

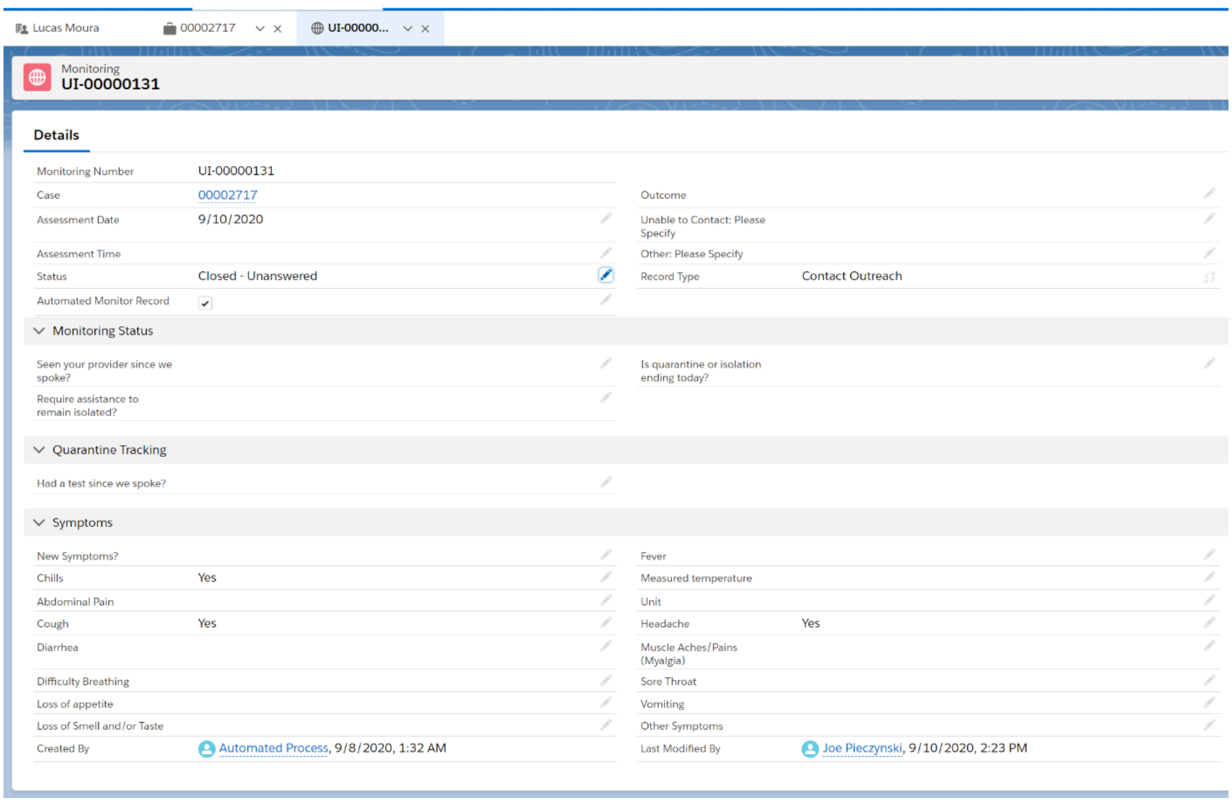
In this section you will learn how cases can be monitored by using MO ACTS to automatically send SMS messages to contacts during their quarantine duration in order to efficiently track their symptoms if/as they arise.

MO ACTS will automatically generate SMS messages to actively monitor contacts by linking to a form to collect symptoms every day for the duration of quarantine (14 days since the last exposure date). This will occur as long as the case meets the following criteria:

1. The **phone number field** on the case record is populated
2. The **email field** on the case record is populated
3. The **birth date** field on the case record is populated

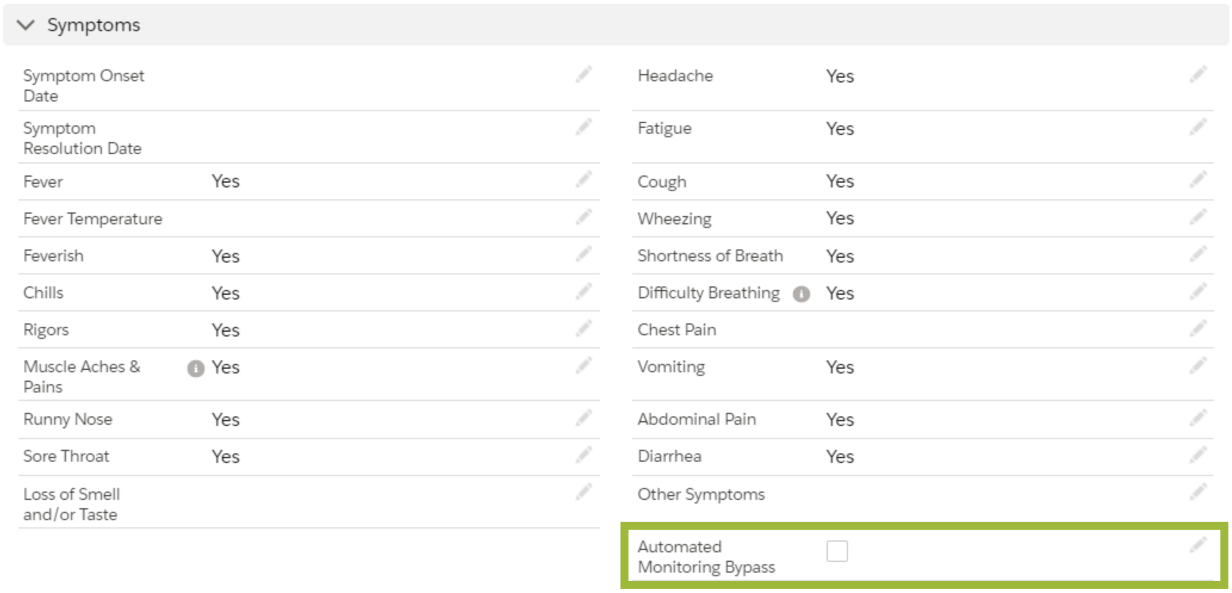
The data entered by the Contact each day will generate a monitor record in MO ACTS as depicted below which the Contact Tracer can view in the Contact Outreach Case record.

NOTE: If when speaking to the Contact they are aware of and provide a new date of last exposure, the contact tracer can manually update this field in Salesforce **and** EpiTrax individually. The monitoring would then continue 14 days past the most recently populated Last Exposure Date



NOTE:

The MO ACTS system will attempt to send a message if there are one or more phone number(s) pre-populated to the case record, even if the phone is a landline. At this time, we cannot track if a message was received, however, **we recommend asking the contact during the outreach process whether or not they would like to receive a SMS message to monitor their symptoms**. If not, the contact tracer can bypass auto case monitoring for the contact by using the checkbox pictured below within the **Case Details** under the **Symptoms** section and can follow the standard case monitoring procedures in place.

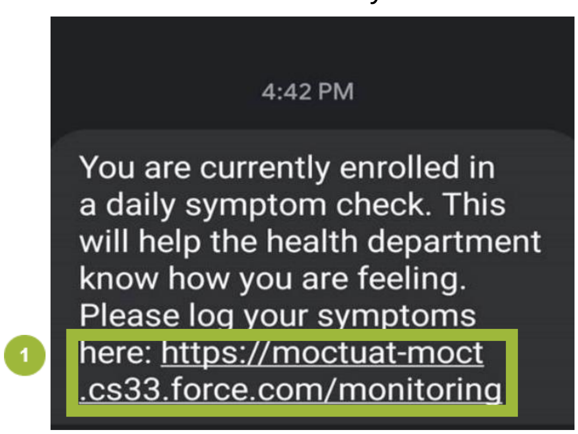


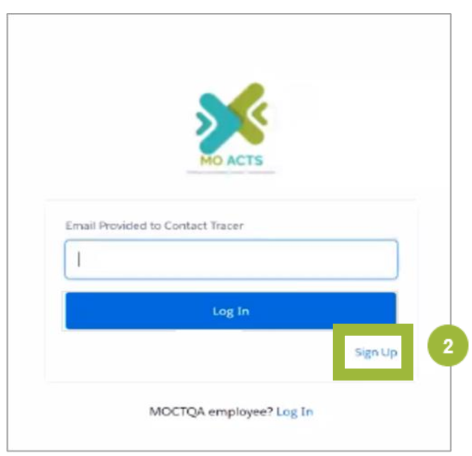
Symptoms

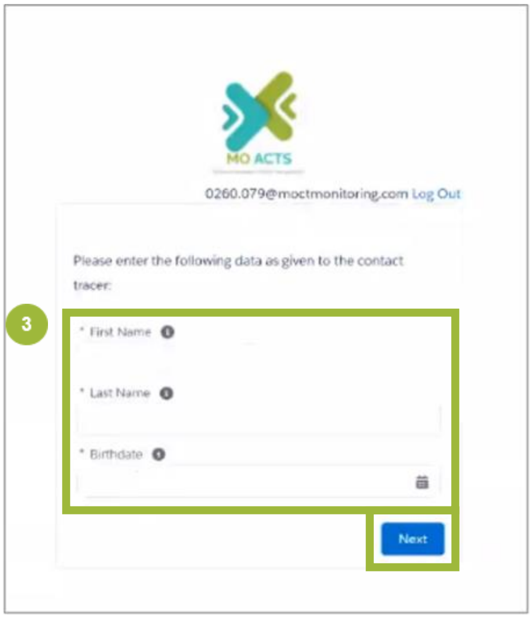
Symptom Onset Date		Headache	Yes
Symptom Resolution Date		Fatigue	Yes
Fever	Yes	Cough	Yes
Fever Temperature		Wheezing	Yes
Feverish	Yes	Shortness of Breath	Yes
Chills	Yes	Difficulty Breathing	Yes
Rigors	Yes	Chest Pain	
Muscle Aches & Pains	Yes	Vomiting	Yes
Runny Nose	Yes	Abdominal Pain	Yes
Sore Throat	Yes	Diarrhea	Yes
Loss of Smell and/or Taste		Other Symptoms	
		Automated Monitoring Bypass	☐

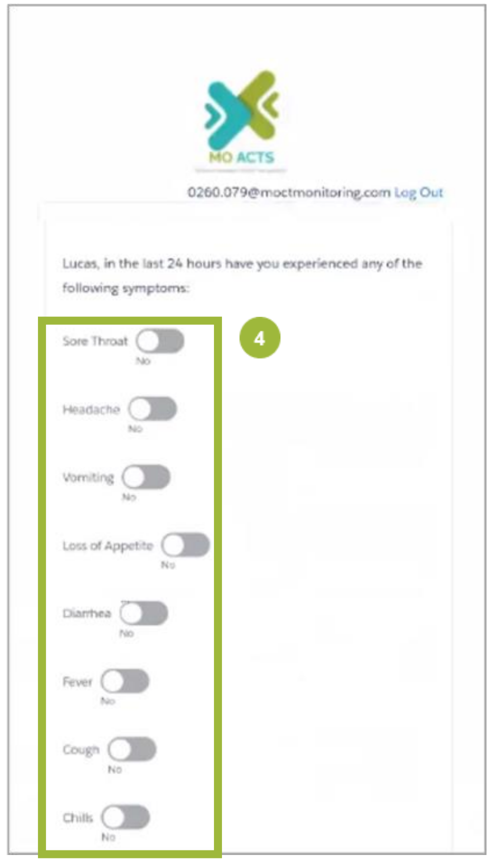
For awareness, this is what the Contact to a COVID-19 Case will see and the steps they will take once they receive the text to provide and track their symptoms, starting with signing in for the first time.

1. The contact will receive the SMS message at **9 AM CST** every day during the quarantine period.
2. The contact will click the link, and then will need to select **Sign Up** for their first-time logging in. If not, they will receive an error message.
3. Once signed up and authenticated, they will enter their information (**First Name**, **Last Name**, and **Birthdate**) as was given to the contact tracer and select **Next**.
4. Then, they will be able to track their symptoms which will then be collected in the monitor record automatically.






3
MO ACTS
0260.079@moctmonitoring.com Log Out
Please enter the following data as given to the contact tracer:
* First Name
* Last Name
* Birthdate
Next

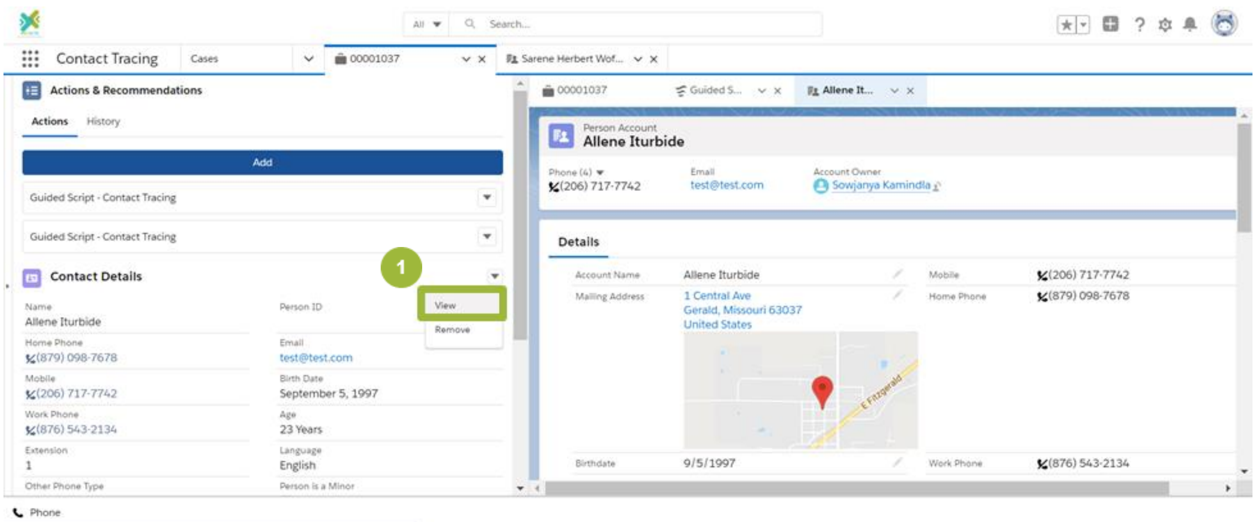

4
MO ACTS
0260.079@moctmonitoring.com Log Out
Lucas, in the last 24 hours have you experienced any of the following symptoms:
Sore Throat
No
Headache
No
Vomiting
No
Loss of Appetite
No
Diarrhea
No
Fever
No
Cough
No
Chills
No

MO ACTS Multiple Exposures for One Contact

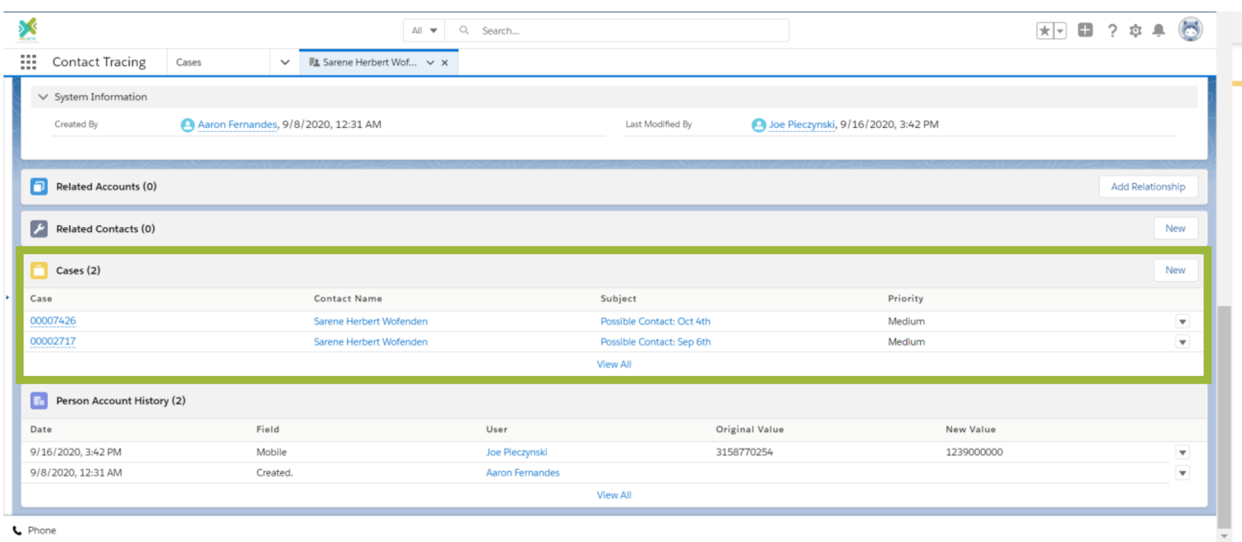
On the **Person Account** section of the Contact to COVID-19 case, contact tracers will now be able to see multiple exposures to positive or probable COVID-19 cases listed out under the **Cases Section**.

NOTE: The contact to COVID-19 case is de-duped when the information comes over from EpiTrax into MO ACTS.

1. To see the multiple exposures, navigate to the **Person Account** by clicking on the **Contact Name** from the List Queue or select **View** from the drop-down field under **Contact Details** from the **Case**.



2. The list of Positive or Probable Cases for the Contact will displayed under **Cases** if applicable.



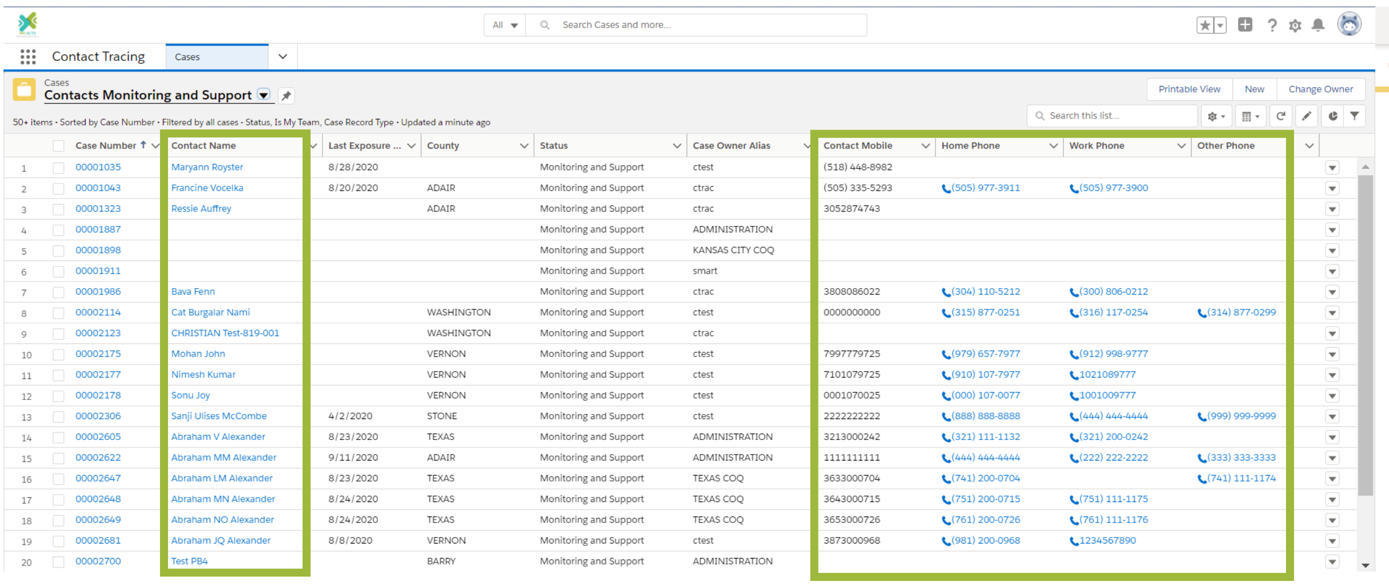
MO ACTS System UI Enhancements

In this section you'll learn about new user interface enhancements in MO ACTS.

List View

In all list views, contact tracers now have the ability to see the following additional fields:

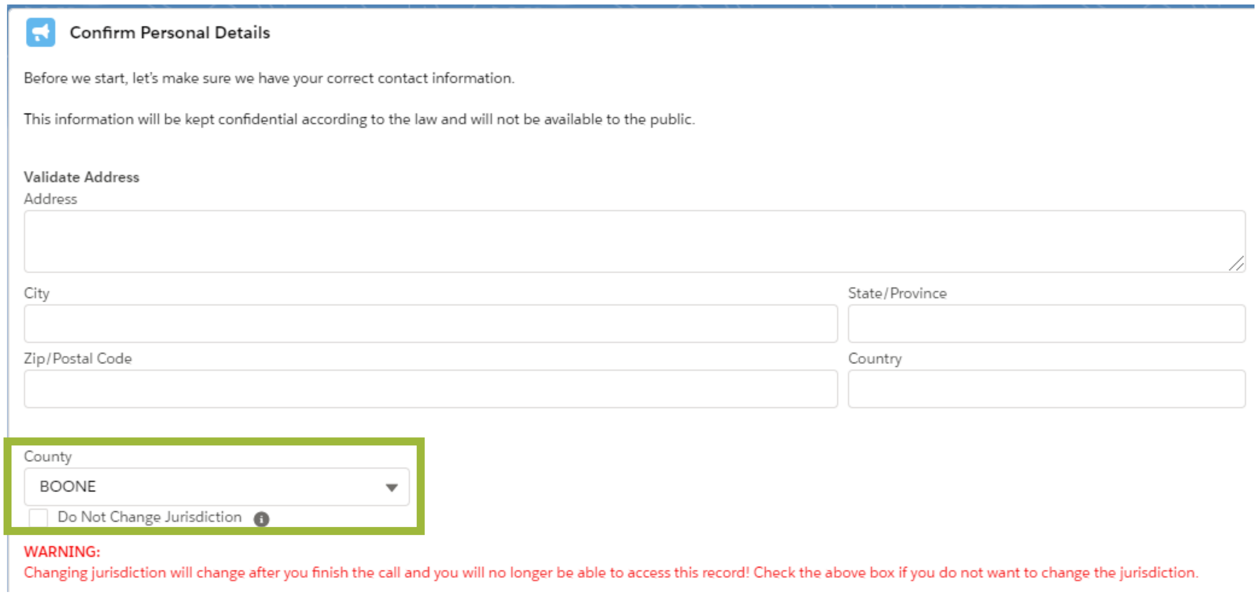
- Contact Name
- All Phone Numbers within the record (Mobile, Home, Work, Other)



	Case Number	Contact Name	Last Exposure ...	County	Status	Case Owner Alias	Contact Mobile	Home Phone	Work Phone	Other Phone
1	00001035	Maryann Royster	8/28/2020		Monitoring and Support	ctest	(518) 448-8982			
2	00001043	Francine Vocelka	8/20/2020	ADAIR	Monitoring and Support	ctrac	(505) 335-5293	(505) 977-3911	(505) 977-3900	
3	00001323	Ressie Auffrey		ADAIR	Monitoring and Support	ctrac	3052874743			
4	00001887				Monitoring and Support	ADMINISTRATION				
5	00001898				Monitoring and Support	KANSAS CITY COQ				
6	00001911				Monitoring and Support	smart				
7	00001986	Bava Fenn			Monitoring and Support	ctrac	3808086022	(304) 110-5212	(300) 806-0212	
8	00002114	Cat Burgalar Nami		WASHINGTON	Monitoring and Support	ctest	0000000000	(315) 877-0251	(316) 117-0254	(314) 877-0299
9	00002123	CHRISTIAN Test-819-001		WASHINGTON	Monitoring and Support	ctrac				
10	00002175	Mohan John		VERNON	Monitoring and Support	ctest	7997779725	(979) 657-7977	(912) 998-9777	
11	00002177	Nimesh Kumar		VERNON	Monitoring and Support	ctest	7101079725	(910) 107-7977	1021089777	
12	00002178	Sonu Joy		VERNON	Monitoring and Support	ctest	0001070025	(000) 107-0077	1001009777	
13	00002306	Sanji Ulises McCombe	4/2/2020	STONE	Monitoring and Support	ctest	2222222222	(888) 888-8888	(444) 444-4444	(999) 999-9999
14	00002605	Abraham V Alexander	8/23/2020	TEXAS	Monitoring and Support	ADMINISTRATION	3213000242	(321) 111-1132	(321) 200-0242	
15	00002622	Abraham MM Alexander	9/11/2020	ADAIR	Monitoring and Support	ADMINISTRATION	1111111111	(444) 444-4444	(222) 222-2222	(333) 333-3333
16	00002647	Abraham LM Alexander	8/23/2020	TEXAS	Monitoring and Support	TEXAS COQ	3633000704	(741) 200-0704		(741) 111-1174
17	00002648	Abraham MN Alexander	8/24/2020	TEXAS	Monitoring and Support	TEXAS COQ	3643000715	(751) 200-0715	(751) 111-1175	
18	00002649	Abraham NO Alexander	8/24/2020	TEXAS	Monitoring and Support	TEXAS COQ	3653000726	(761) 200-0726	(761) 111-1176	
19	00002681	Abraham JQ Alexander	8/8/2020	VERNON	Monitoring and Support	ctest	3873000968	(981) 200-0968	1234567890	
20	00002700	Test PB4		BARRY	Monitoring and Support	ADMINISTRATION				

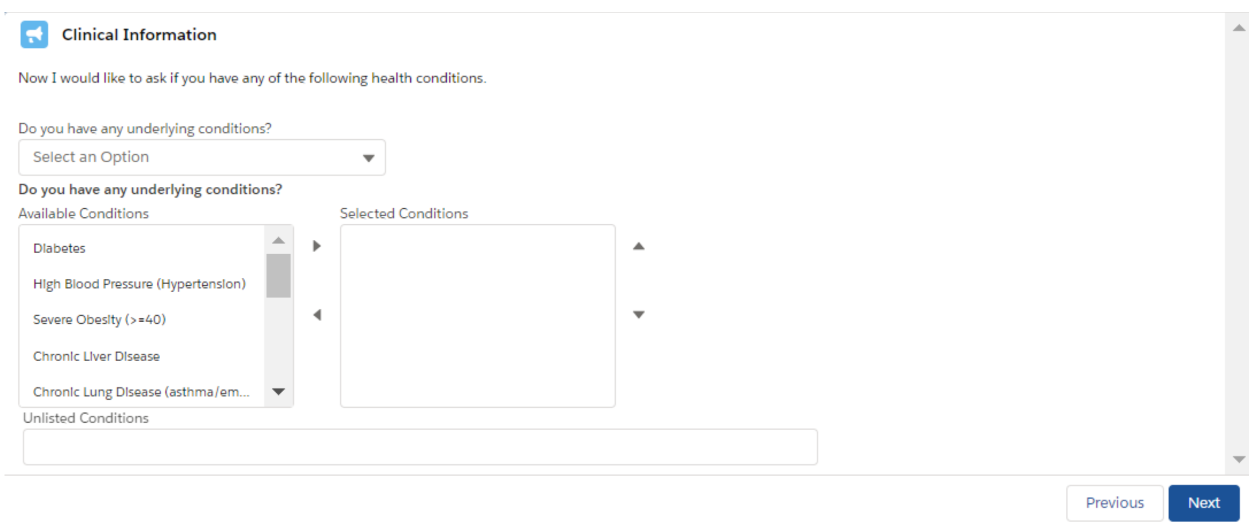
Editable County Field

A new county field that you can edit has been added on the page layout during the outreach process to the contact to a COVID-19 case.



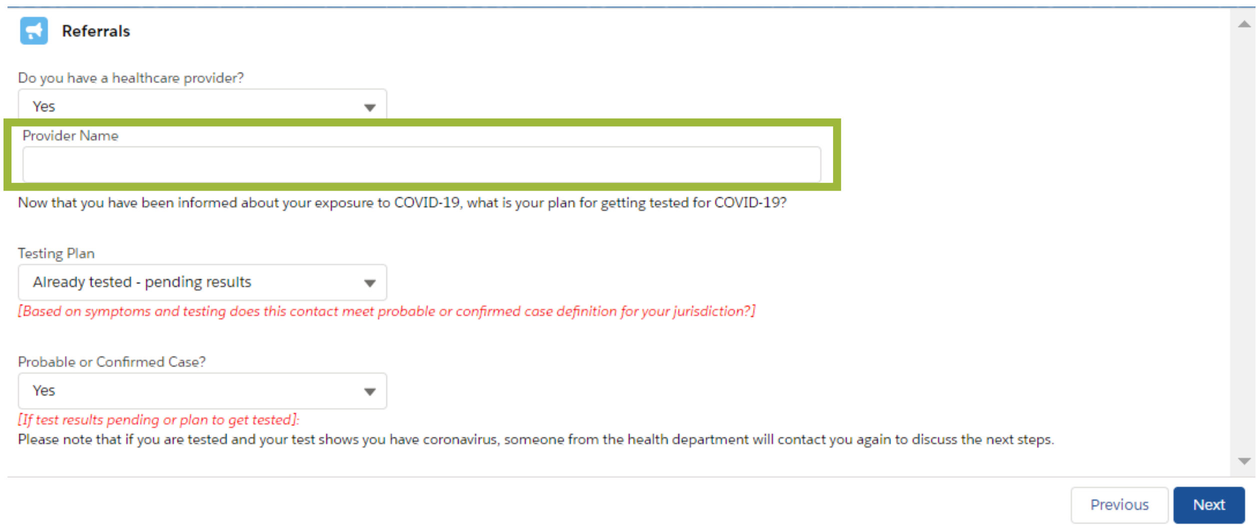
Enhanced Picklists

Additionally, the picklists have been updated so that they are more user friendly to navigate. For example, in the Clinical Information section of the guided script, you can now select from the **Available Conditions** list by holding down CTRL + clicking, then click the right arrow to add them to the **Selected Conditions** list.



New Provider Field

A new field for **Provider Name** has been added that will pre-populate in the guided script flow if the if there is a value present in the Case Detail Page.



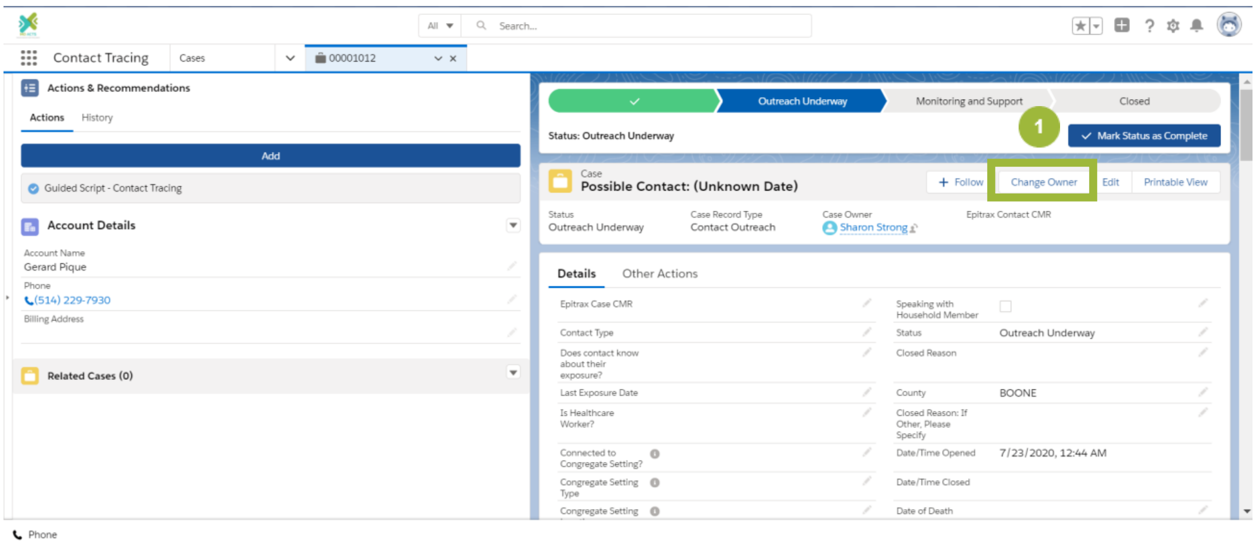
MO ACTS Surge Resource Enhancements

In this section you will learn about case visibility when jurisdiction case ownership is transferred to a surge resource.

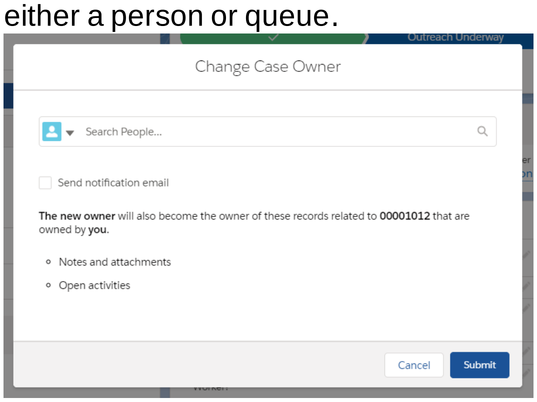
Previously, in MO ACTS, if a contact to a COVID-19 case record's ownership transferred from a jurisdiction to a surge resource (e.g. transferred the contact case to the Administration queue), anyone with jurisdiction access would lose access and visibility for that contact case. With the newest MO ACTS system enhancement, a jurisdiction will not lose access and will still be able to view the case.

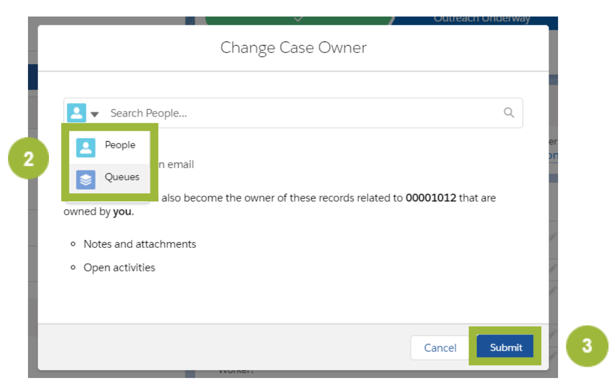
The following steps will demonstrate how a contact tracer can change the ownership of a case.

1. First, select **Change Owner** from the case record.



2. Next you will see a pop up where you are able to search for and assign the case to either a person or queue.





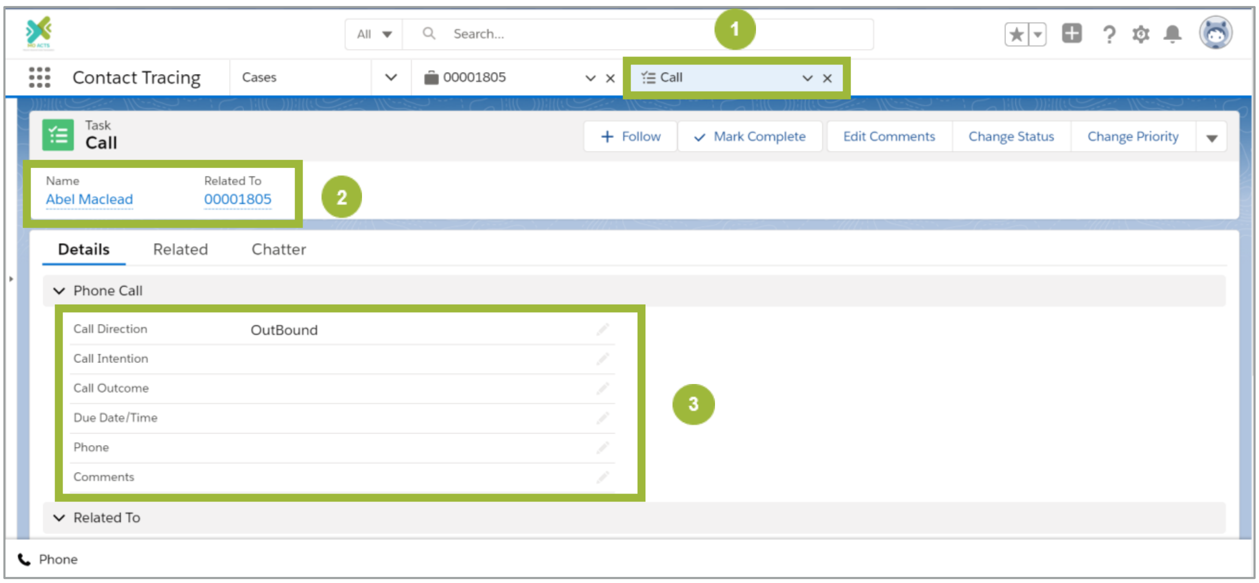
3. Search for the person or queue you want to change ownership to and click **Submit**.

MO ACTS Auto Task Logging for Calls Functionality

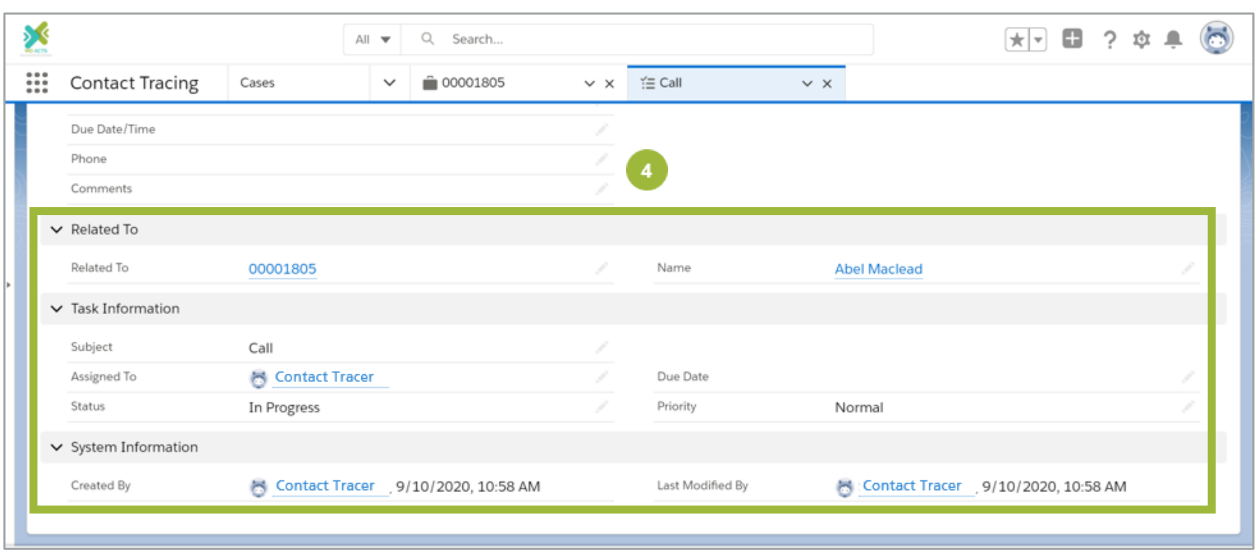
In the past, the Contact Tracer has taken steps to log a Contact Outreach call after it is placed. Now, MO ACTS will automatically create a task for every outbound call after the call is disconnected. The Contact Tracer can then update the task with the call intention and additional details.

In this section, you will learn how the process for logging calls has been updated to occur automatically during the Contact Outreach Process.

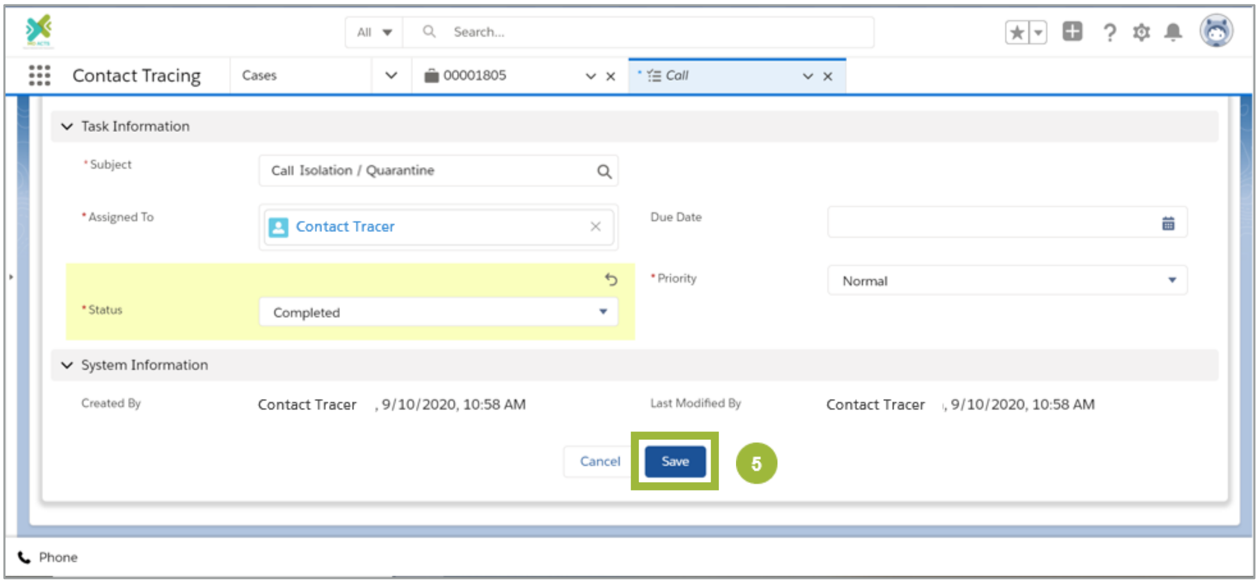
1. After disconnecting an outbound call, a new **Task tab** will automatically open.
2. You will find the **Contact's name and Case number** on top of the new window.
3. Complete the **Phone Call Details** by selecting the pencil icon to edit**. Call Direction** will be auto-populated as **Outbound.**



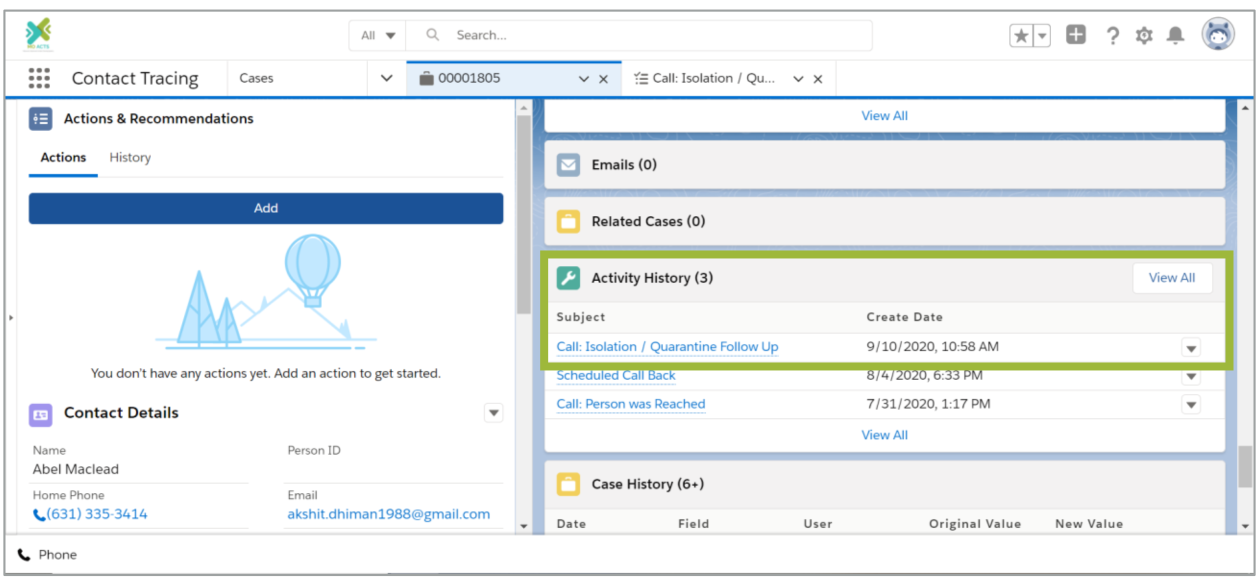
4. Note that some fields on the following sections (Related to, Task information and System information) have also been auto populated for you. However, these fields can still be edited by selecting the pencil icon to edit.



5. Once all the call information has been entered, save your changes.



NOTE: If you go back to the **Activity History** section under the Contact's **Details**, you will find that the call has been successfully logged.



MO ACTS Inbound Calling Functionality

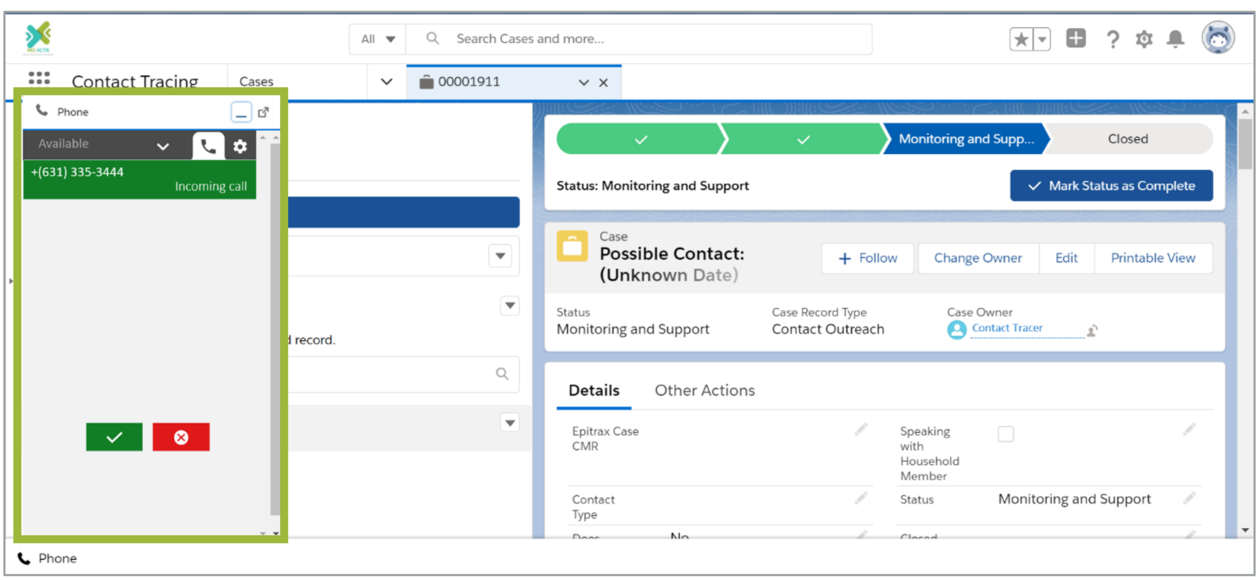
Contact to a COVID-19 cases are now able to call back through the MO ACTS number and Tracers will receive these inbound calls.

The Contact to a COVID-19 Case will be calling the existing AWS number for both inbound calling and for SMS call backs (314-696-69920).

When a Contact to a COVID-19 Case calls, the call will follow routing logic based first on the case being associated to a phone number or next through the associated jurisdiction/county. There are three potential scenarios:

> **Scenario A - Phone Number is Associated to a Case and Assigned to a Contact Tracer**: The call will route to the Contact Tracer assigned to the case and if they are unavailable it will be route to the associated LPHA queue. If 60 seconds pass without an available agent to answer, the call will be routed to the DHSS queue for surge support. The call will then continuously loop and search for an available agent until the call is answered and processed.
>
> **Scenario B - Phone Number is Associated with a Jurisdiction**: The call will route to the associated LPHA queue. If 60 seconds pass without an available agent to answer, the call will be routed to the DHSS queue for surge support. The call will then continuously loop and search for an available agent until the call is answered and processed.
>
> **Scenario C - Phone Number has No Associated Jurisdiction**: The call will route to the Administration queue. If 60 seconds pass without an available agent to answer, the call will be routed to the DHSS queue for surge support. The call will then continuously loop and search for an available agent until the call is answered and processed.

Upon the contact tracer receiving an inbound call, the Contact Tracer's Amazon Connect softphone will automatically pop-up and show a screen similar to the one below.



NOTE:

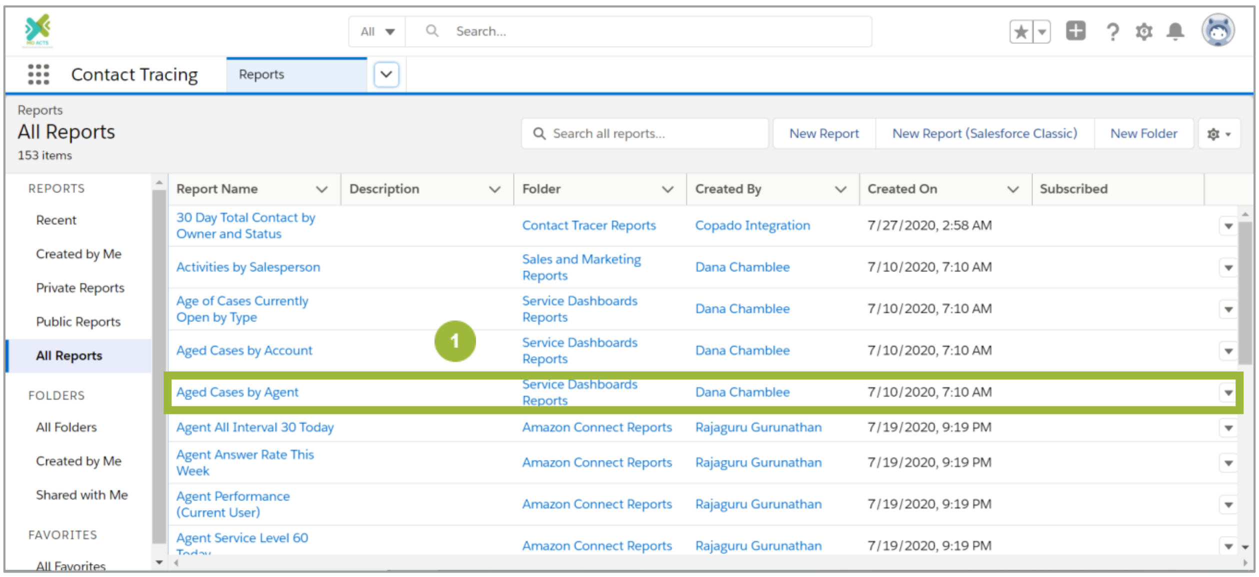
- The phone number of the Contact to a COVID-19 Case of the incoming call will be displayed on top of the Amazon Connect screen.
- You will also find buttons to **Accept** or **Decline** the incoming call.

MO ACTS Reporting Functionality

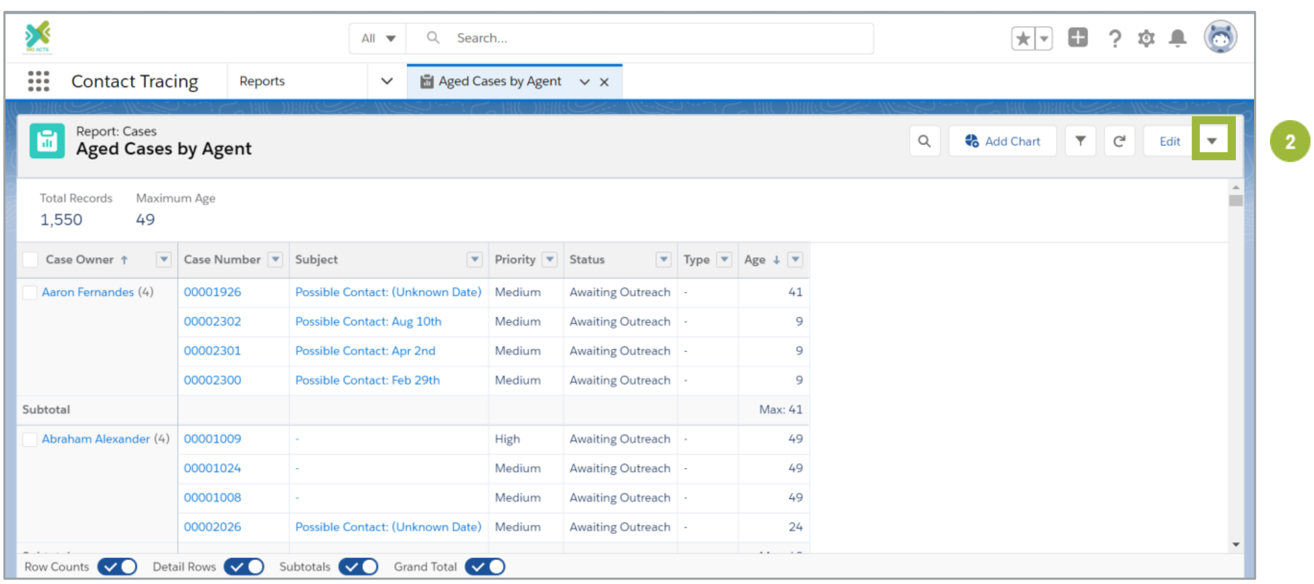
This section will walk through the various reports that Business Admins and Supervisors are able to utilize to track usage of the MO ACTS system, the time it took for a contact tracing case to move to monitoring and support, and the ability to export reports through the View/Configure Setup Menu Export Reports permission

Export of Reports

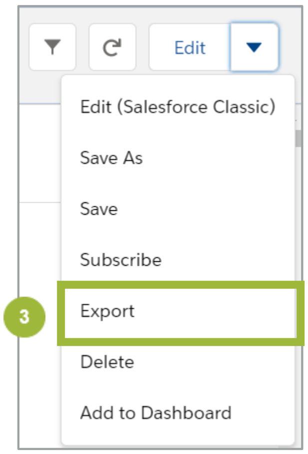
1. On the **Reports** tab, open the report you would like to export data from by clicking on it.

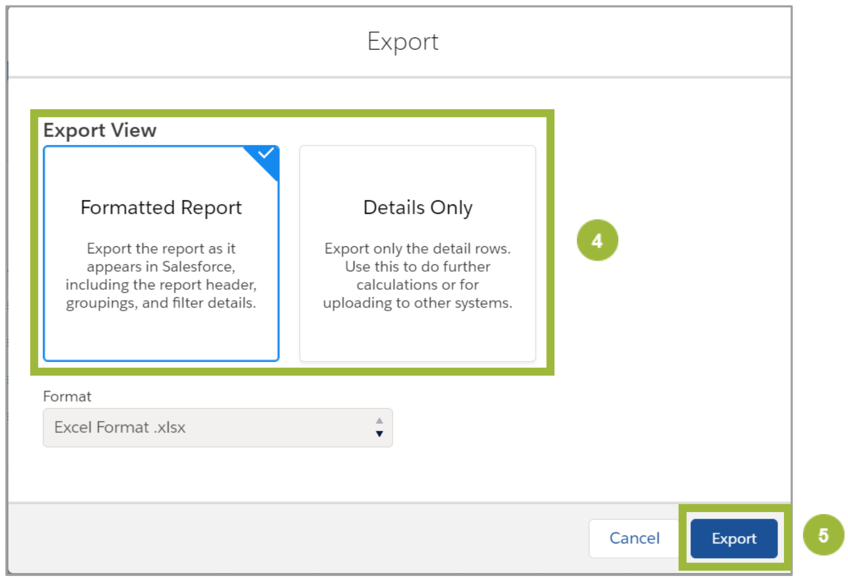


2. Click on the **drop-down arrow** next to the Edit button on the top-right side of the screen.



3. Select **Export** from the drop-down list.
4. Choose your desired **Export View.**
5. Click on the **Export** button.

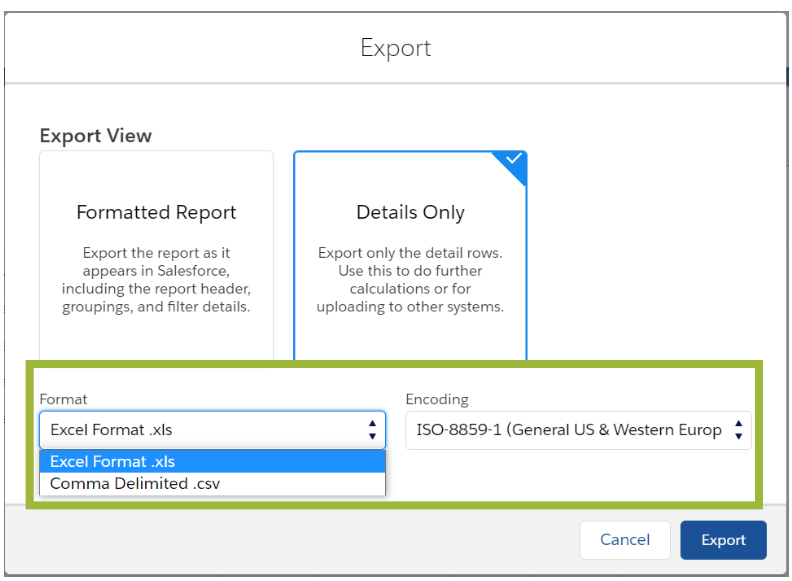




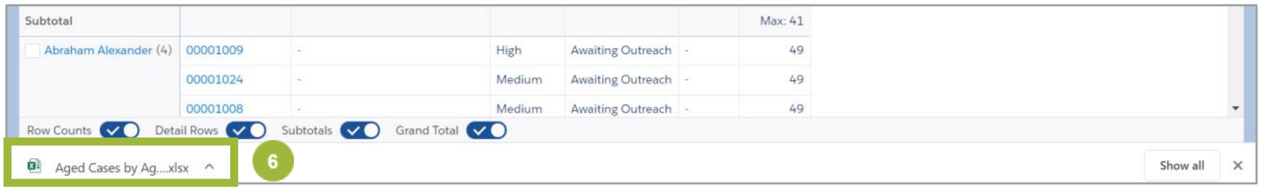
NOTE:

If you **<u>choose Details only as Export view</u>**, you will be able to select:

- **Format:** Excel (.xls) or Comma delimited (.csv).
- **Encoding**



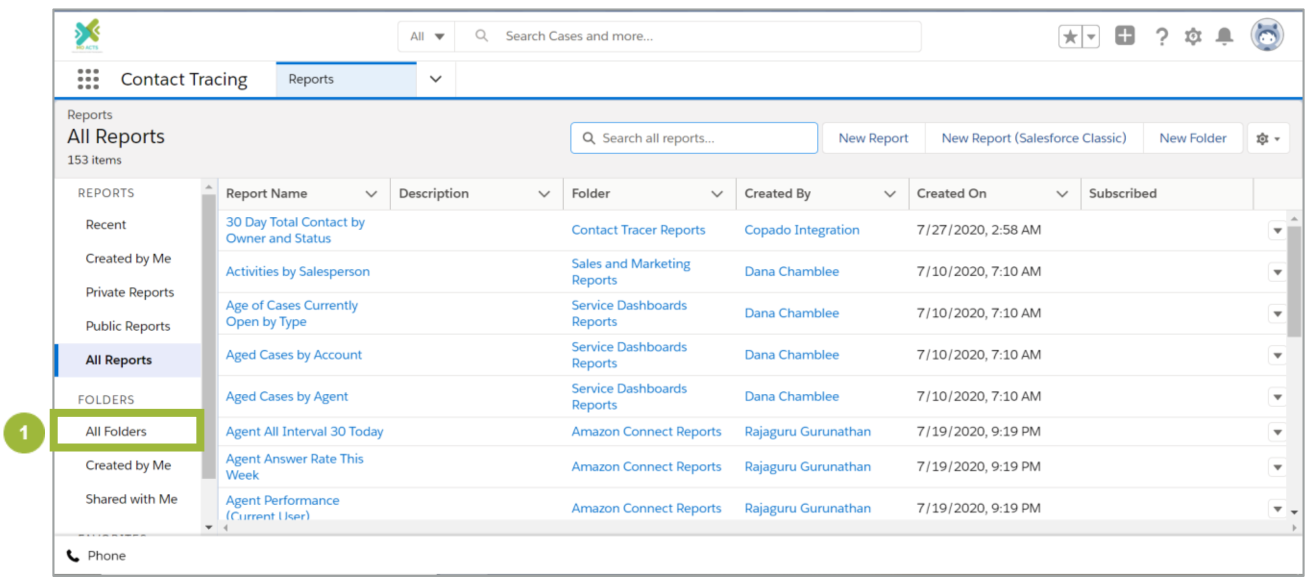
6. The report will be automatically downloaded to your computer.



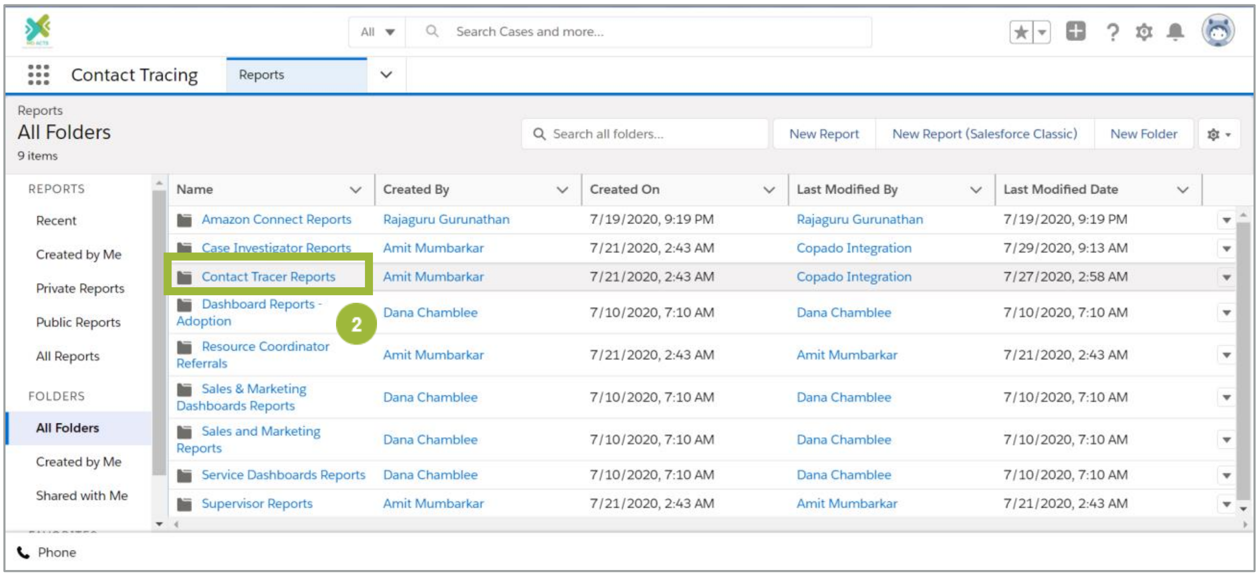
MO ACTS System Usage Reporting

You can now access a set of reports that track usage of the MO ACTS system (e.g. average number of monitoring records).

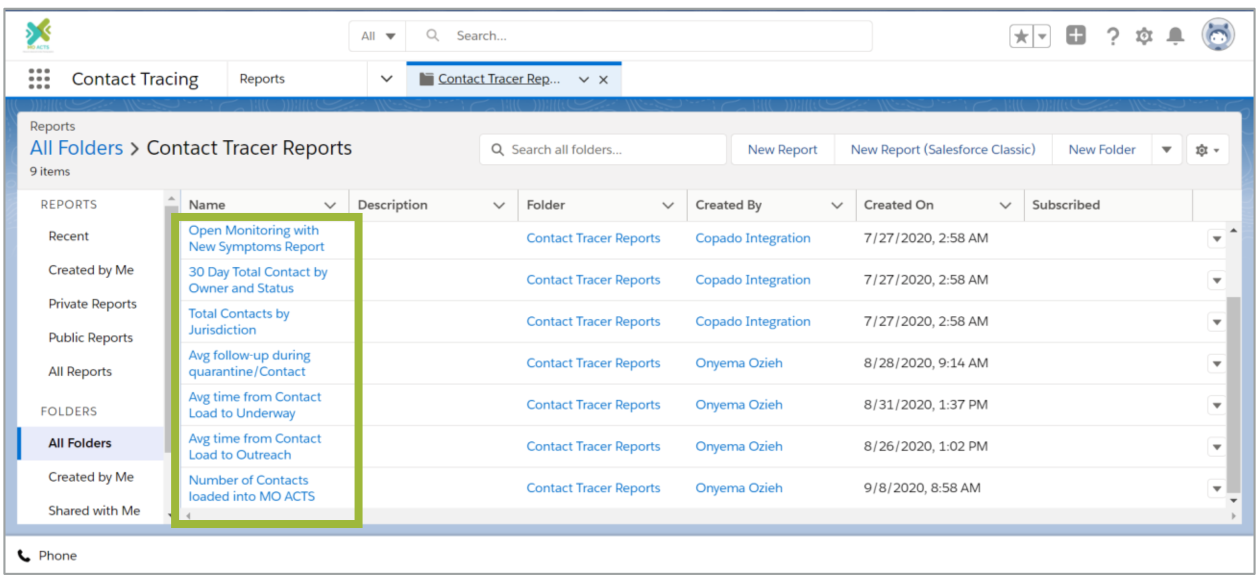
1. On the **Reports** tab, click on **All Folders** from the menu on the left side of the screen.



2. Locate the **Contact Tracer Reports** folder and open it.



3. You will find some helpful new reports.



See below for some example reports.

MO ACTS Report Examples

Average Time from Contact Load to Outreach:

This report shows the average amount of time it takes a Contact to a COVID-19 Case to be successfully reached by tracers from the moment they were loaded into MO ACTS. For each contact, you will also find helpful columns indicating: Case Owner, Case Number, Case Created Date, Interview Completed Date and the Case's status.

Report: Activities with Cases
Avg time from Contact Load to Outreach

Add Chart | Edit

Total Records	Total Time from Contact Load to...	Average Time from Contact Loa...
40	256	6

Case Owner ↑	Case Number	Case: Created Date	Interview Completed Date	Time from Contact Load to Outreach (day)	Status
ADMINISTRATION (4)	00001805	7/27/2020	7/29/2020, 8:52 AM	2	Open
	00001805	7/27/2020	7/29/2020, 8:52 AM	2	Completed
	00001805	7/27/2020	7/29/2020, 8:52 AM	2	Completed
	00001805	7/27/2020	7/29/2020, 8:52 AM	2	Completed
Subtotal				8 Avg: 2	
Contact Tracer Test User 1 (2)	00002743	9/8/2020	9/8/2020, 6:48 AM	0	Open
	00002743	9/8/2020	9/8/2020, 6:48 AM	0	Open
Subtotal				0	

Row Counts | Detail Rows | Subtotals | Grand Total

Average Follow-up during Quarantine/ Contact:

This report shows the total number of monitoring records entered by the Contact to a COVID-19 Case as well as the average amount of monitoring records logged. For each contact, you will also find helpful columns indicating: Contact Name, Case Number, Date and Time the case was opened, and the Case Owner.

Report: Cases
Avg follow-up during quarantine/Contact

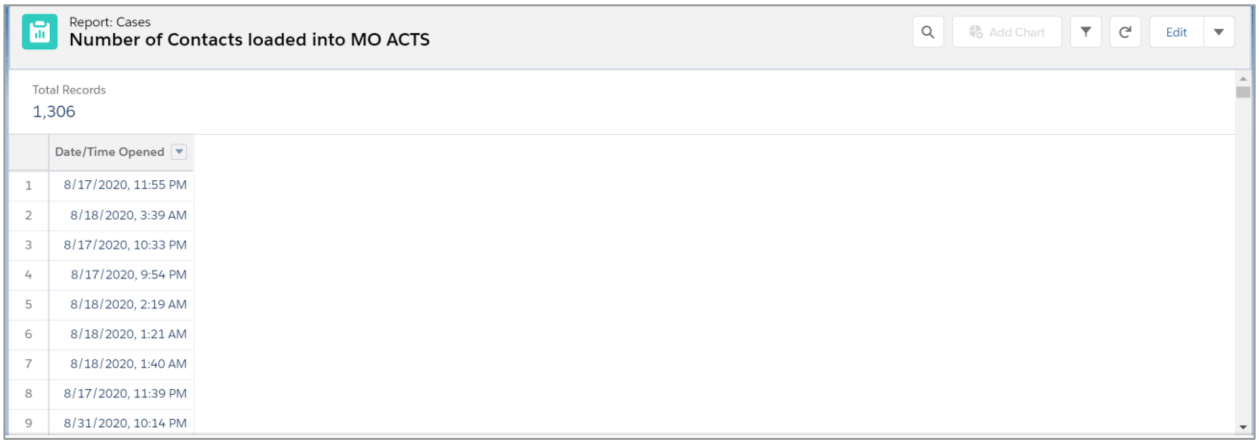
Add Chart | Edit

Total Records	Total Number of Monitoring rec...	Average Number of Monitoring r...
1,581	1,414	1

	Contact Name	Case Number	Date/Time Opened	Case Owner	Number of Monitoring records
1	Rocky Bhai	00002071	8/17/2020, 11:55 PM	Rajaguru Gurunathan	0
2	Wayne Rooney	00002079	8/18/2020, 3:39 AM	Contact Tracer Test User3	0
3	Fede Valverde	00002069	8/17/2020, 10:33 PM	Contact Tracer Test User 10	0
4	Subash Thomas	00002068	8/17/2020, 9:54 PM	Contact Tracer Test User3	0
5	Hareesh Ravindran	00002078	8/18/2020, 2:19 AM	MONTGOMERY COQ	0
6	Akbar V Khan	00002072	8/18/2020, 1:21 AM	Contact Tracer Test User 9	0
7	Amar Akbar Anthony	00002073	8/18/2020, 1:40 AM	ADMINISTRATION	0
8	Amar V Antony	00002070	8/17/2020, 11:39 PM	Contact Tracer Test User 9	0
9	Bijo Q Fariz Rafique	00002257	8/31/2020, 10:14 PM	Contact Tracer Test User15	0

Number of Contacts Loaded into MO ACTS:

This report shows all contacts loaded into MO ACTS with information on the date and time these cases were opened.



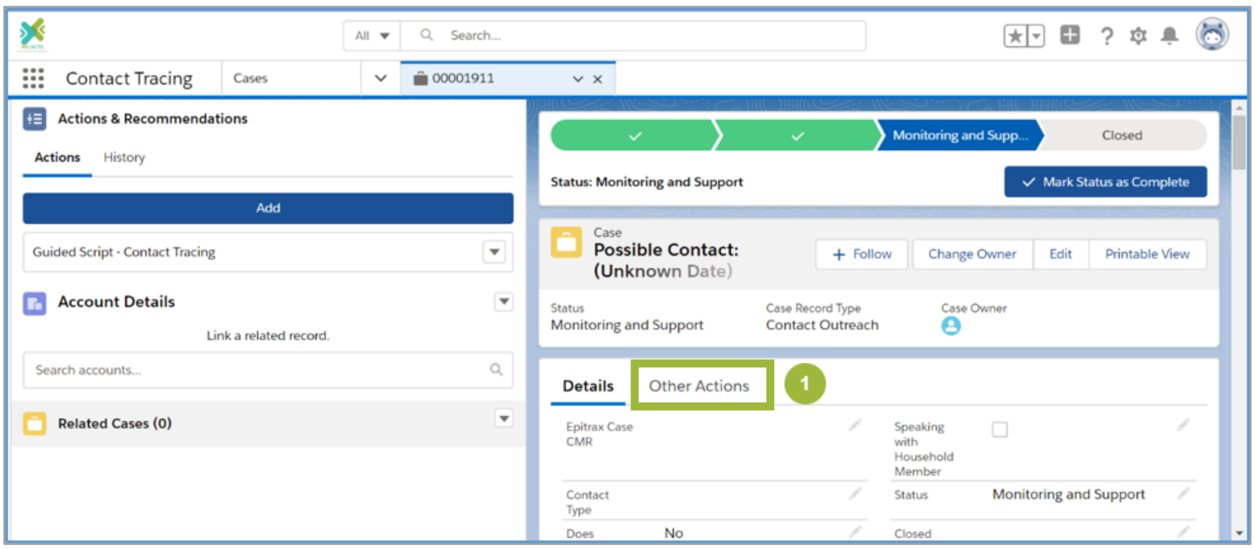
Other useful new reports available are:

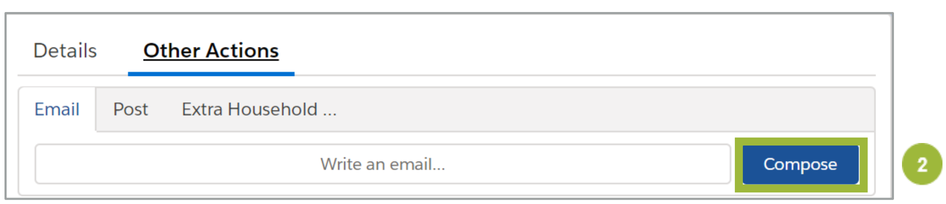
Report	Description
Number of Outreaches (day by day)	Shows the number of tasks created grouped by day.
Number of Users Actively Using the System	Shows the number of users that have logged in in the last 14 days.

MO ACTS Email Functionality

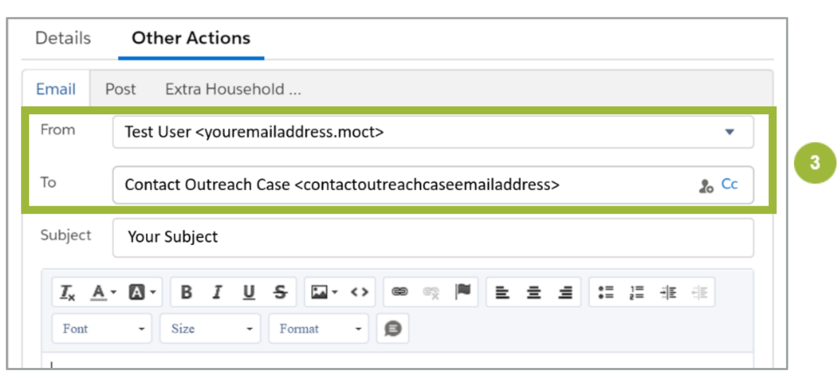
Users will have the ability to send an email to a contact after a call has successfully been completed when the Contact to a COVID-19 Case is in the Outreach Underway or Monitoring and Support statuses. To do so, follow these steps:

1. Navigate to the selected Contact to a COVID-19 Case tab. On the **Details** section, click the **Other Actions** tab.
2. The Email tab will open. Click on the **Compose** button.



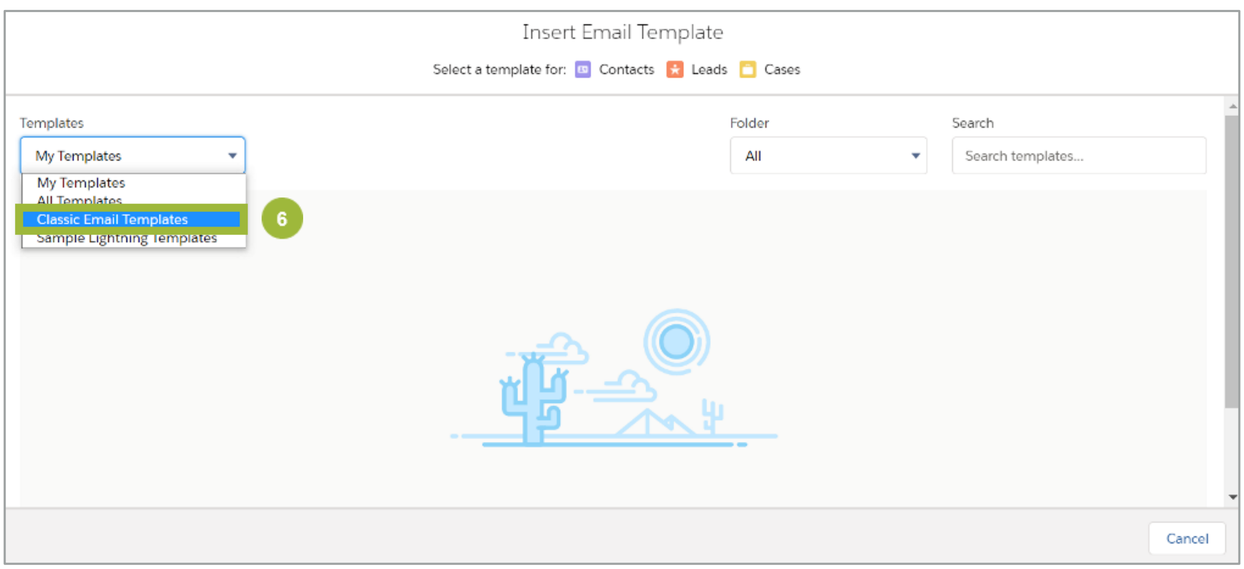


3. The Email window displays. You will see your email address defaulted in the **From** field. Also, the contact's email address (if provided) will be pre-populated in the **To** field. These fields are editable, if necessary.



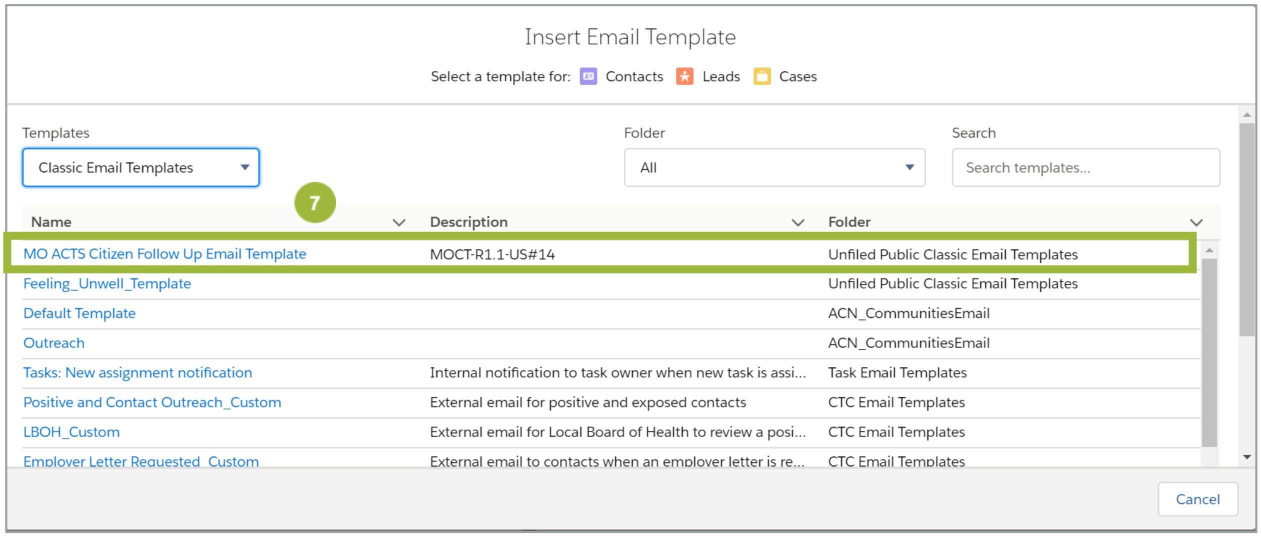
4. Before composing your message, scroll down and click on the **Insert, create, or update template** button.
5. Click on **Insert a template.**

6. A new window opens. On the left, select **Classic Email Templates** category from the drop-down.

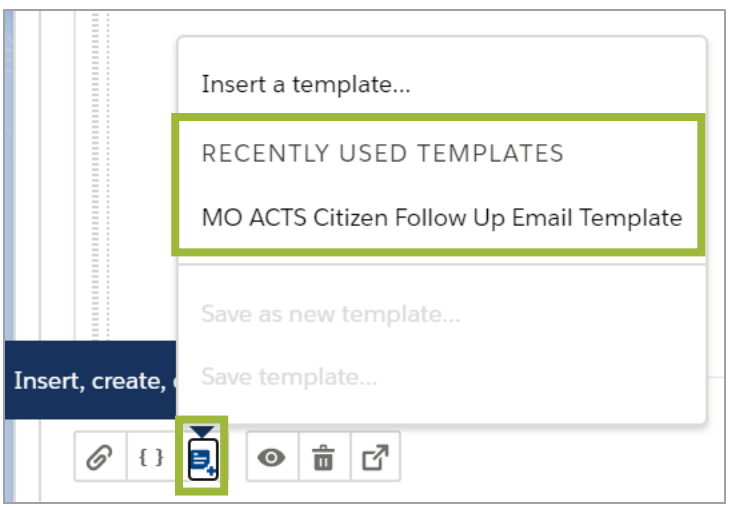


7. Select **MO ACTS Citizen Follow Up Email** template. This will render an email header and footer based on the Case Owner's jurisdiction.

NOTE: Templates vary among jurisdictions so no pre-set body message will display.

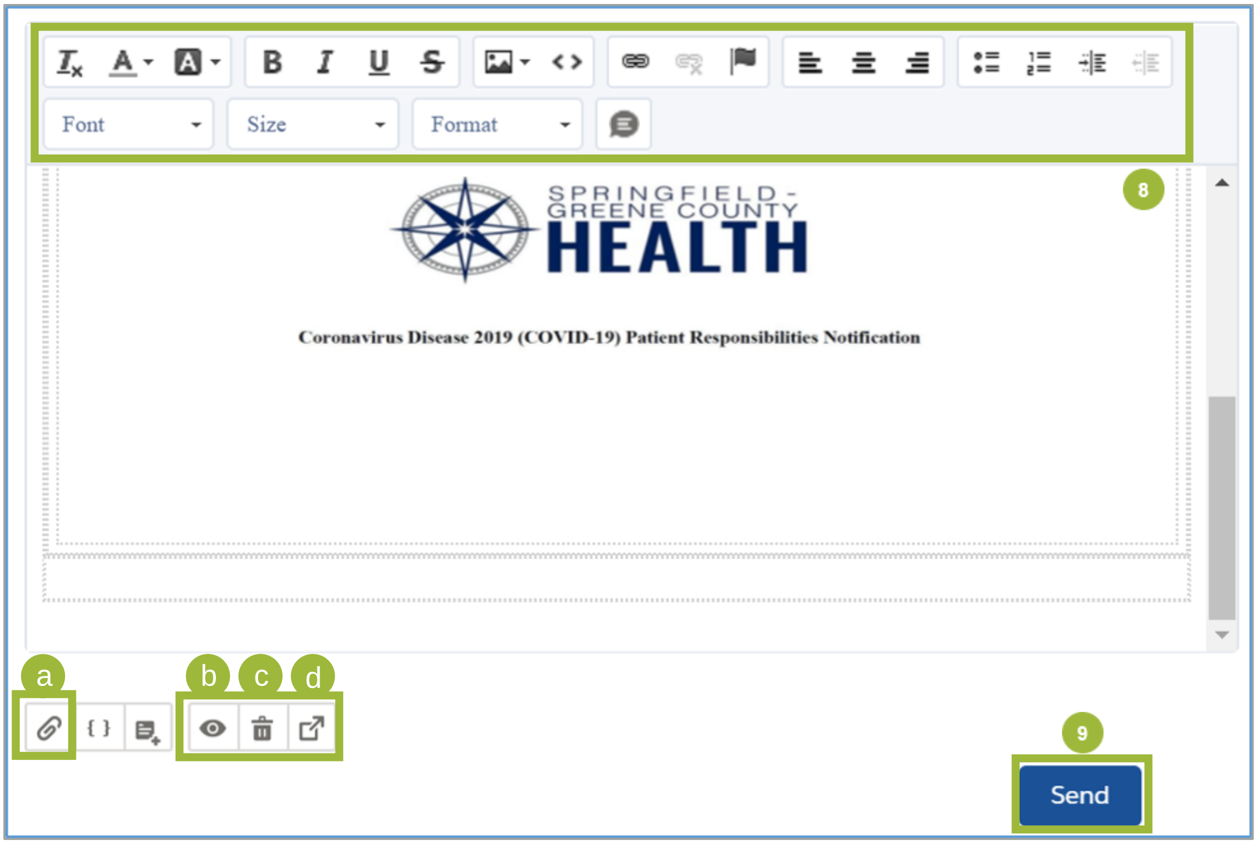


NOTE: After selecting it once, this template will become available as a **Recently Used Template**. You will find it for later use when clicking on the **Insert, create or update template** icon.

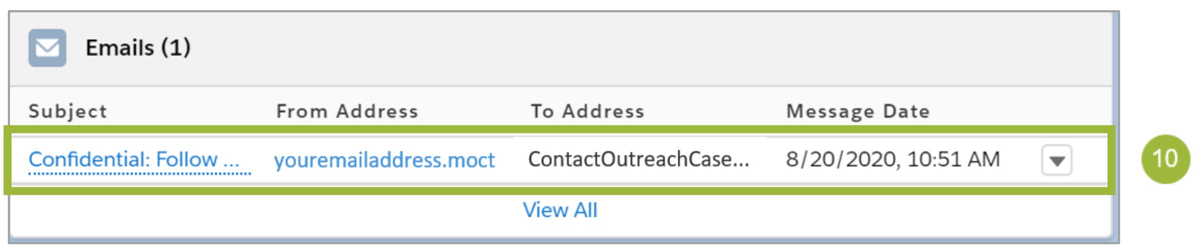


8. Now, you are ready to write your message. Fill in the desired content - either by typing a message, or copy-pasting one into the window. You can use the **tools bar** on top to change its format or the tools bar at the bottom to perform different actions:
    a. Attach file
    b. Preview email
    c. Clear email and revert
    d. Popout to docked view

9. Once you are satisfied with your message, click **Send**.



10. You have successfully sent an email. MO ACTS keeps a log of all your sent emails. It can be found by scrolling down the **Details** section of the case, under the Email category.



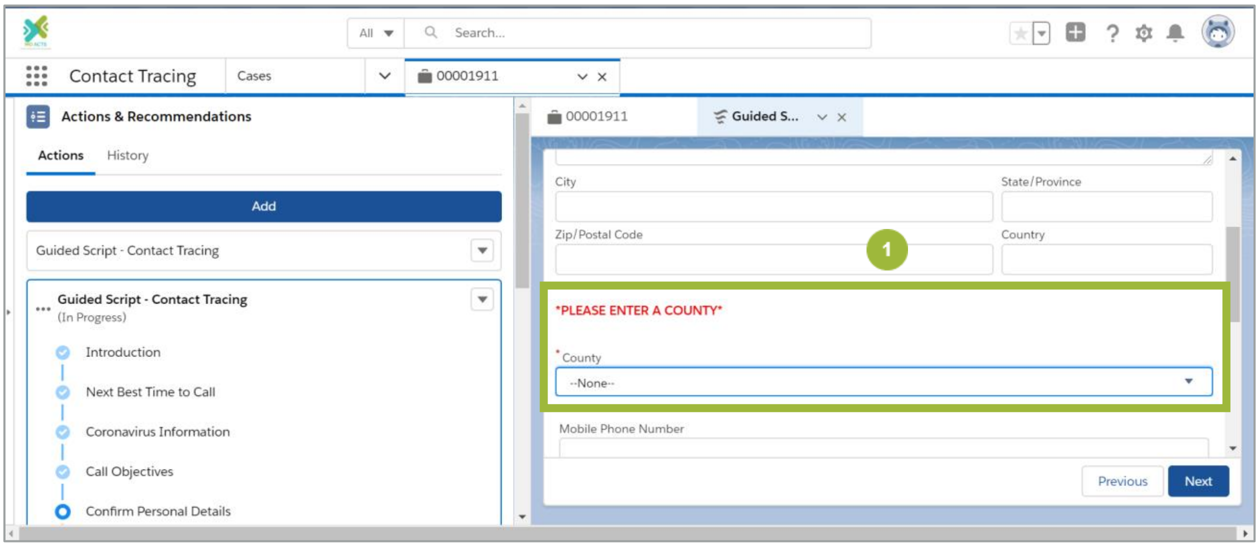
NOTE: Any replies from the contact will be routed to the **sender's inbox**.

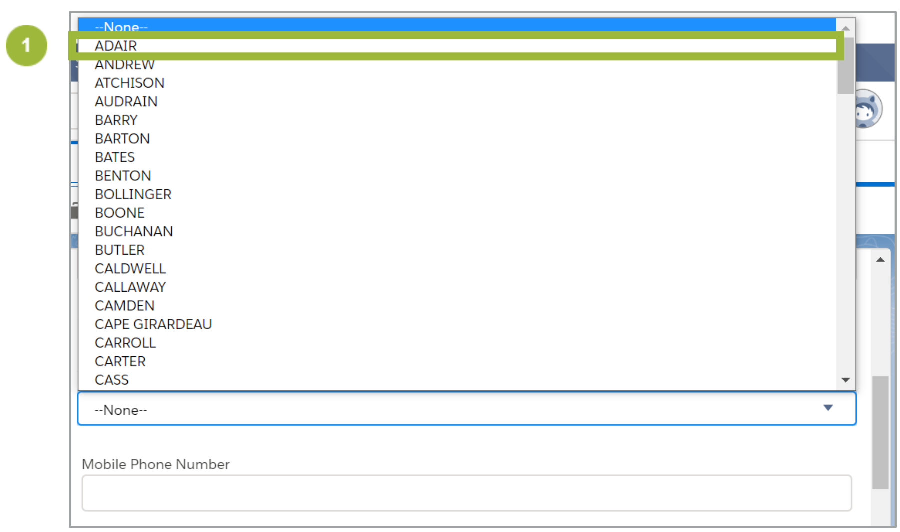
MO ACTS Change County or Jurisdiction Functionality

On the **Personal Details** section of the Guided Script, users will see the contact's **County**.

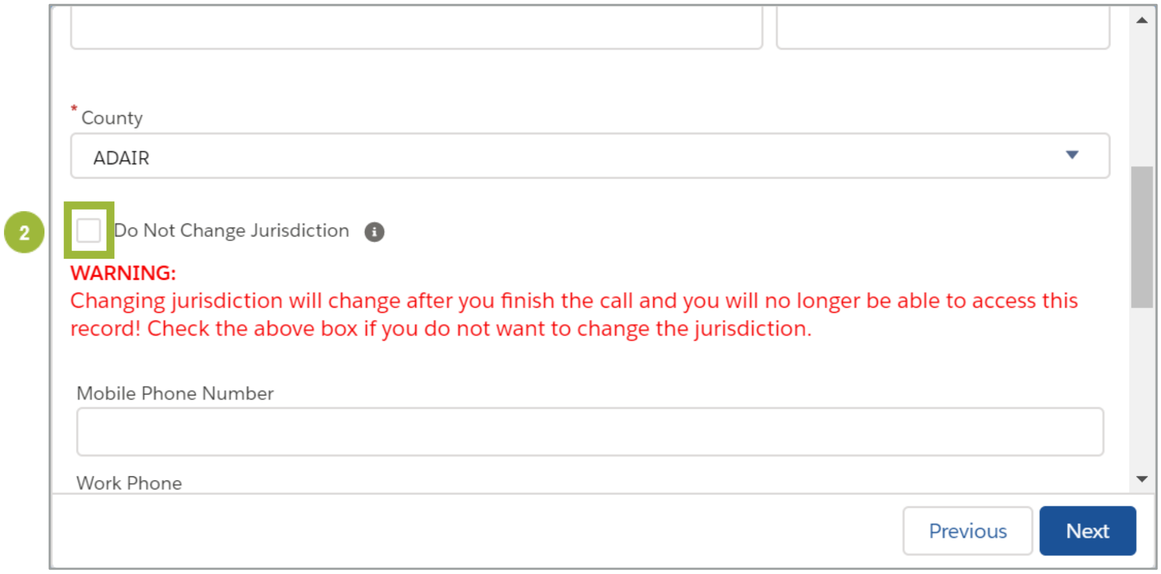
NOTE: This field is considered **mandatory** to continue to the next section of the script.

1. To change the county, click on the drop-down field and select the correct **County**.





2. If you want to change the county but **NOT** the jurisdiction select the **Do Not Change Jurisdiction** checkbox.



NOTE:

If you **<u>do not</u>** use this checkbox, the jurisdiction will change and therefore:

- **Permissions** for this case will change as well, preventing you from accessing this record after saving. The case will also disappear from the current queue once it is closed (e.g. once the call ends).
- If the jurisdiction that the case is assigned to does not have any users in the MO ACTS platform, the case will be directed to the **Administration queue.**